

PLA 2005 Spring Symposium

Building a Marketing Communication Plan

Tuesday, March 8, 2005
2:00-5:00 p.m.

Presenters:
Peggy Barber and Linda Wallace
Library Communication Strategies

Market driven libraries* . . .

- Know their markets.
- Treat everyone like a customer.
- Have everyone on the marketing team.
- Ask, ask, ask. Then Listen.
- Innovate constantly.
- Don't fear the competition.

**Mission-Based Marketing. How Your Not-For-Profit Can Succeed in a More Competitive World, Peter C. Brinckerhoff, John Wiley & Sons, Inc. 1997*

Agenda

- 2:00 **Introductions/Ground rules**
If you could have a marketing miracle, what would that look like?
- Marketing Basics**
- The Communication Plan: Step-by-Step**
- Introduction
- Goals
- Objectives
- Positioning
Exercise: Write your library's positioning statement.
- Key Audiences: Internal & External**
- 3:15 **Break**
- 3:45 -**The message**
What makes a message memorable?
Exercises: Name that slogan
What should your library's message be?
- Delivering the message: Strategies**
What do you do now? What could you do...new, more, better?
- Evaluation**
How do you know it's working?
- 3:45 **Wrap Up**

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Marketing Basics

Marketing is that function of the organization that can keep in constant touch with the organization's consumers, read their needs, develop products that meet these needs and build a program of communications to express the organization's purposes. (Kotler/Levy)

A four-step marketing communication program . . .

- 1) **Research:** Analyze the situation and get facts (primary and secondary research).
 - A. Describe the community including demographic characteristics (race, sex, age, educational level, occupations)
 - B. Describe the library including . . . staff, support, governance, circ, trends etc.
 - C. Define your audience (market segments) and their needs
- 2) **Plan:** Set goal, determine objectives, develop strategies.
 - A. Start with the library's mission. (Become mission driven, market dependent)
 - B. Develop a communications strategy—positioning statement. Pick market segment(s) or target audience(s) for your communications program and develop your rationale. Formulate goals, *measurable* objectives, budget and timetable. Assign tasks. Focus on asking core markets what they want.
- 3) **Communicate:** Public relations, advertising, sales, community relations.
 - A. Develop a message (appeal) or campaign theme. Select communication methods/materials targeted to specific market segments.
 - B. Develop tools such as a basic fact sheet for the library, campaign press kit, talking points etc.
 - C. Build a press/contact list—media and opinion leaders—and use it.
- 4) **Evaluate:** Are objectives (measurable) being met?
 - A. Set up evaluation procedures.
 - B. Measure performance vs. plan and adjust for the variance.

Getting Started

Follow the outline provided in developing a marketing communication plan for your library. A sample plan is also included. Your plan can be an overall, multi-year plan for the library or focus on a particular project (winning support for a new building) or audience (increasing use by seniors/teens). If the plan is multi-year, be sure to indicate: Year I, Year II, Year III. Also include a timetable, person responsible and budget.

Tips:

1. **Think first.** Why are you doing this? Your introduction should explain the purpose and nature of the proposed plan. Keep it brief with a few good supporting facts and examples.
2. **Get other involved.** Involving others—library staff, trustees and Friends—makes for more and better ideas and a stronger sense of ownership.
3. **Stay focused.** All elements of the plan should build on and support the others. Objectives should support the goals. The message should support the positioning statement. Strategies should relate to your key audiences and how you will achieve your objectives. Evaluation measures should reflect the objectives.
4. **Turn the dream into reality.** Make your objectives concrete and measurable steps toward achieving your goal. Use them as part of your evaluation measures.
5. **Think like the people out there.** Your positioning statement is also a vision statement of how you want your library to be seen by others. What kind of image do you want to communicate? What makes your library special?
6. **Target your audiences.** This does not rule out other more general communications. To be strategic, your plan should identify 3—no more than 5—key audiences. Remember to include your internal audiences, also funders and other influentials whose support is critical to your success.
7. **Keep it simple.** Your key message should be easy to say and remember—ideally, no more than 10 words. It doesn't have to be a slogan although it might be adapted to serve as one. It should be something you could say to your neighbor, at the check out desk, in a presentation or a media interview.
8. **Remember the rule of 7.** What seven strategies can you use to reach your target audience? If your strategies include publishing a brochure, identify how and where will it be distributed? To whom? Which groups will you contact for presentations. Be sure to include strategies for engaging internal audiences.
9. **Be ambitious but realistic.** Remember, "If it's not doable, it won't get done."
10. **Keep everlastingly at it.** That's what John Cotton Dana, perhaps our first, best library promoter, would say. Take time to evaluate and learn from your successes and failures. Update and revise your plan accordingly.

Building a Marketing Communication Plan

Use this outline as a map for developing your plan.

1. **Introduction** (Briefly explain *why* you are proposing this plan. Identify Strengths, Weaknesses, Opportunities and Threats (SWOT). Include relevant research, observations.)
2. **Communication goals** (The dream. Big picture. No more than 3.)
3. **Objectives** (3-5 doable, measurable outcomes.)
4. **Positioning statement** (Briefly describe what you would like the library's image to be in the hearts and minds of others. What makes you unique? Example: "*The library is the best first stop for expert help in connecting children and youth to learning and discovery.*" (State Library of North Carolina campaign))

5. **Key message** What is the most important thing you want people to know/do? In 10 words or less. Example: *Your library is the very best place to start.*
6. **Key audiences** (External and Internal. Be specific. No more than 5.)
7. **Communication strategies** (How will you deliver the message? E.g. media, publications, displays, presentations, word of mouth)
8. **Evaluation measures** (How will you know what worked and what didn't? Refer back to your objectives.)

Turning Mission into Message

Note how fewer words, a clear focus and active tense pack more power, also how personalization communicates a warmer, more welcoming message.

Before

The mission of the ----- Library is to help the people of our community to achieve their full potential.

After

We help people lead better lives.

Before

The mission of the ----- Library is to bring people and information together in a cost-effective manner so that citizens may enrich their own lives. The library encourages and fosters reading at all age levels, whether for recreation or information, supports education and lifelong learning and helps the public obtain information.

After

The ----- Library brings people and information together.

Before

Preserving yesterday
Informing today
Inspiring tomorrow

After

The ----- Library preserves yesterday, informs today and inspires tomorrow.

Before

The ----- Library is a cultural and intellectual center for the community. It provides, at a reasonable cost and in a friendly atmosphere, universal access to knowledge and lifelong learning through print, electronic resources, cultural activities, programs and services. The library collaborates with other community groups to meet the educational, informational and recreational needs of the entire community.

After

The ----- Library is a cultural and intellectual center for our community.

Sample Marketing Communication Plan

The Somewhere Public Library

June 2004-2006

Introduction

The Somewhere Public Library has come a long way in a short time. Since moving to its current site two years ago, library visitors have increased almost 300 percent and the number of cardholders has grown by 700 percent from 245 to 2,178—still only about 10 percent of the community's residents. Like all libraries, the Somewhere Public Library must compete for the time and attention of potential users and supporters—from the Internet, bookstores, other libraries, sports, work and other activities. Some residents still remember the library as a volunteer "card table" operation in the school basement. The library board has set a goal of expanding its facility, either at its present site or at another location to be determined. There is a clear need and a tradition of library support among community residents and leaders. A preliminary feasibility study indicates there is excellent potential for a ballot measure supplemented by private fundraising. Building a strong base of community awareness about what the library offers, its needs and the possibilities is key to building momentum for this effort.

Goals

- The Somewhere Public Library will enjoy a high profile in the community. It will be seen as an important and popular destination for learning and enjoyment.
- Community leaders and all residents will be aware of and use library services.
- Community leaders and residents will approve a library expansion plan and support a funding campaign.

Objectives

- The library will secure financial support for a new library.
- The number of cardholders will increase 600 percent for a total of 60 percent registration.
- The library will develop partnerships with three or more new community groups.

Positioning

The Somewhere Public Library provides top quality service close to home in a comfortable, welcoming atmosphere. In addition to books, it offers audio books, CDs, videos and other multimedia resources. Its "online branch" is open 24/7. Most importantly, there are professional librarians to provide expert assistance. The Somewhere Public Library is a community center for lifelong learning, literacy and enjoyment for families and people of all ages. Although bigger than it looks, the library is not as big as it needs to be. With more space, the library could offer much more. The library is a best value and deserves the community's support.

Key Message(s)

The Somewhere Public Library provides top quality service close to home.

We're bigger than we look—but not as big as we need to be.

Key audiences

Internal: Staff, Board, Friends, Volunteers

External: County officials and community leaders
Community groups with influential members
Library users
Families with children from preschool-high school

New:
Business and professional community

Year 1—June 2005-06

Objectives

- The number of cardholders will increase by 200 percent.
- Attendance at programs will increase by 50 percent.
- Twenty influential individuals and community groups will endorse the building project.
- City officials/other key leaders will approve an expansion plan for the library and endorse a funding plan.
- The library "family" will understand and actively support the library's new communication focus.

Key Audiences

Internal: Library staff, board members, Friends and Volunteers

External: City officials and community leaders
Community groups with influential members
Families/parents with children from preschool-high school
Library users

Strategies

1. **Begin a consistent, planned program of two-way communication.**
 - Establish a citizens group to advocate support for a bigger library.
 - Encourage and prepare staff, board members, Friends and volunteers to deliver the library's message to library users, their families, friends, neighbors, key officials. Involve them in planning activities. Provide updates.

- Invest in professional graphic design for formatting promotional materials, e.g. the newsletter, bookmarks. Have a consistent look and message. Publish a dynamic brochure with the emphasis on benefits, not just a listing of services. Distribute it outside the library—at meetings of community groups and other community locations.
 - Prepare an expansion fact sheet outlining the library's services, its growth and needs.
 - Conduct a customer satisfaction survey. Use quotes in promotional materials.
 - Provide evaluation forms at all programs asking how the audience members heard about the program, its quality and suggestions for other programs.
 - Invite customer comments in the library and on the library's home page. Respond to all comments in writing and with action, when appropriate.
 - Organize a letter writing campaign to members of the county board and local newspapers.
 - Begin planning the library's fundraising initiative in connection with its 5th anniversary celebration in 2006.
- 2. Seek a higher profile in the media.**
- Make a media plan with dates for seeking news stories in connection with special events, feature stories and editorial endorsements.
 - Place at least three feature stories about services such as "databases" or homework help for kids and—what they are and what they can do for you.
 - Invite local newspapers to send a photographer for special kids' events or take and submit photos.
 - Offer reporters a demonstration of how the library's databases work.
 - Place a feature story about the library—its limitations and potential.
 - Seek editorial support for a bigger library building.
 - Place an op-ed by the library board president and letters to the editor from trustees about the library's needs and opportunities.
- 3. Reach out to elected officials, community leaders and groups with influential members.**
- Communicate at least once a month with key officials in person and print. Provide regular updates. Offer to demonstrate the library's databases at their desk.
 - Present a state-of-the-library report to the county board and key organizations.
 - Identify ways that community groups and businesses can help promote the library to their members/customers and how the library can assist them.
 - Assign a liaison to keep in regular touch through attendance at meetings, occasional phone calls and mailings of the library newsletter, annual report, etc.

- Recruit partners, including at least one new partner, to cosponsor/underwrite activities for National Library Week, Library Card Sign-up Month, etc.
 - Present programs/host tours for county officials, members of the Chamber of Commerce and other influential groups.
 - Seek at least 20 endorsements for a library expansion project from key leaders and influential community groups.
- 4. Focus on families as a key user group and source of support for the library's building campaign.**
- Sponsor a library card sign-up drive during national Library Card Sign-up Month in September. Offer rewards for library users who recruit new card registrants.
 - Ask businesses to offer "Show Us Your Library Card" discounts.
 - Visit all day care centers, kindergarten and first grade classrooms. Provide library card registration, booklists and other promo materials for teachers and for kids to take home to parents.
 - Display photos of entire families holding their library cards in the library and post them on the website.
 - Sponsor a contest "Why My Family Uses the Library" and award prizes underwritten by partners.
 - Continue outreach to schools via visits, flyers and announcements.
 - Sponsor "Family Fun Friday" or other regular event to focus attention on what the library offers families.

Evaluation

- Communication plan in place: Do staff, board, Friends and volunteers understand the library's goals and their role?
- A stronger, more consistent look and message in library publications
- 200% increase in cardholders
- 50% increase in program attendance
- Ongoing survey and feedback mechanisms in place
- At least 3 programs presented to key community groups
- Feedback (formal and informal) from users and target audiences, customer satisfaction surveys, word of mouth
- Media placements—3 features, editorial endorsement
- At least one new partner
- 20 endorsements from key individuals and groups
- Expansion plan approved by county officials

Year 2—June 2005-2006

Evaluate and build on Year 1. Revise/update goals, positioning and message. Establish objectives. Continue key target audiences as appropriate. Continue (or discontinue), amend and add new strategies and evaluation measures.

Objectives

- The library will have one or more new partners.
- Cardholders will increase by 200% percent

New:

- Library will launch a funding plan for expansion with endorsements from the county board and a dozen other key groups and individuals.
- The library will sponsor a major community event with participation of 500 or more.
- The library will receive at least three major donations from community groups and businesses prior to the campaign launch in Year 3.
- The library will establish relationships with three major employers.

Key Audiences

Internal: Library staff, board members, Friends and Volunteers

External: County officials and community leaders
Community groups with influential members
Library users
Families with children from preschool-high school

New: Business/professional community

Strategies

Continue and update strategies 1-4 from Year 1. Be consistent and constant in delivering the library's key messages.

New:

1. **Strengthen the library's image as a force in promoting literacy.**
 - Sponsor a major event in honor of the library's 5th anniversary, e.g., a community-wide discussion of a specially selected book. Aim for 500 participants.
2. **Launch a fundraising campaign.**
 - Secure at least three major gifts in advance of public announcement.
 - Secure endorsements from county officials/other influential leaders/groups
3. **Reach out to at least three major employers.**

- Ask to do employee presentations on how the library can assist them, e.g. databases, literacy/computer classes, expert assistance; also library needs.
- Provide personal demonstrations of library databases for key figures.
- Do on site library card registration.
- Host lunch hour book talks/discussion led by a library volunteer.
- Recruit employees as library volunteers.
- Provide copies of the library newsletter/booklists/fact sheet/other updates for employee staff rooms.
- Solicit major corporate gifts.

Evaluation

- 200% increase in cardholders
- Ongoing survey and feedback mechanisms in place
- Feedback (formal and informal) from users and target audiences, customer satisfaction surveys, word of mouth
- Media placements—3 features, editorial endorsement

New:

- Expansion plan approved by county board
- Fundraising campaign launched with endorsements from county board and 12 influential groups and individuals; 3 major donations
- 500 participate in "Somewhere Reads" project
- Partnerships with 3 major employers

Year 3—June 2006-2007

Review and update plan based on evaluation of previous years and development of a fundraising plan. Add new target group(s) and strategies.

Sample Message Sheet

Key Message

The Somewhere Public Library provides big city service close to home.

Talking points

- The Somewhere Public Library is a best value. All you need is a library card.
- We're open 24/7 online. Check out our Web site.
- You are important to us. If the title you want isn't on the shelf, we'll get it for you.

Key message (Expansion)

We're bigger than we look—but not as big as we need to be.

Talking points

- The library is the heart of our community, a place for lifelong learning, culture and enjoyment.
- With more space, we could offer more—more programs, a meeting room for community groups, art exhibits, a bigger children's area, teen corner—even a coffee cart.
- Library use is growing. Our building needs to grow too.

Statistics

Since we moved to our new building three years ago, the number of cardholders has grown 700 percent. The number of visitors is up 300 percent.

Story

More and people are discovering our library. Just the other day I helped a man look up some information he needed for his job. His wife had told him he should come. He said he was amazed at what he found and couldn't believe he didn't have to drive 40 miles to the Big City Library. We hear this almost every day.

Sample Message Sheet II

Key message

Make sure everyone in your family has the smartest card—a library card.

Talking points

- Why buy when you can borrow? Your public library is a goldmine of books, magazines, movies, CDs and other great stuff for the whole family.
- The more kids read, the better they do in school. Your library has something for every age and interest.
- The library is open 24/7. Check us out online at . . .

Facts

- Last year our library users checked out an average of ?? with an estimated value of ??.
- X number of children participated in the library's summer reading program.

Story

One mother told me that the library is about the only place her whole family goes together. She said, "We love family nights. And we can always find something to read. It's the one place we can afford and we all enjoy. I don't know what we would do without it."

Really Good Resources

Books...

Mission-Based Marketing: Positioning Your Not-for-Profit in an Increasingly Competitive World, 2nd Edition. Peter C. Brinckerhoff, John Wiley & Sons, Inc, 2002. \$35.00. Yes, it's a little expensive, but well worth it. Borrow it from the library! Brinckerhoff provides a clear, step-by-step guide for identifying and understanding your markets, considering the competition, needs vs. wants and lots more. Practical and interesting.

The Secrets of Word-of-Mouth Marketing. George Silverman, American Management Association, 2001, \$17.95.

Silverman says traditional advertising doesn't have the impact it once did and makes a great case for an organized, strategic approach to word of mouth. This is good news and a practical strategy for libraries, since we couldn't afford traditional advertising anyway.

Libraries, Mission & Marketing: Writing Mission Statements That Work. Linda K. Wallace, American Library Association, 2004.

How many of your staff can say your library's mission statement? That's what we thought. This book is dedicated to the proposition that your mission statement is your library's ultimate message. It should say what you mean and you should do what you say. Lots of sample statements.

Online . . .

Campaign for America's Libraries: www.ala.org/@your library/

A wealth of messages, ideas and strategies for promoting the value of libraries and librarians using the first-ever international library brand.

Library Media & PR: www.ssdesign.com/librarypr/

Terrific online newsletter with ideas, strategies, tips, updates on book/movie tie-ins. downloadable art and more. Creative and practical tips from someone who knows libraries.

Library Research Service: www.lrs.org/oldsite.htm

For an extremely useful community analysis form, look in the left column under Data/Public Libraries. More useful planning tools, including sample community surveys, can be found under Tools at the bottom of the page.

Millennium Library Survey: www.svls.lib.ca.us/SVLS/html/millennium.html

Conducted by Godbe Research Associates for the Silicon Library System, this study of consumers in the California Bay area was reported in April 2000, but the results remain VERY relevant for libraries all over the country.

PR Talk Discussion List

A lively idea exchange for library staff interested in marketing/PR related topics. To subscribe, send message to: alaprocc@ala.org. Leave the subject blank. In the body of the message, type: subscribe PR Talk [your first and last name]

The Smartest Card. The Smartest Campaign: www.ala.org/pla

Check out the toolkit for this PLA/ALA campaign. You'll find downloadable graphics, sample message sheets, tips and more.

Wabash & Lake: www.wabashandlake.com

This Chicago consulting firm is dedicated to creating "customer evangelists." Their focus on word-of-mouth and non-traditional marketing is refreshing. They produce a free e-mail newsletter that is full of good ideas and well worth reading. This isn't all about libraries . . . which makes it all the better.

Marketing as a Team Sport

The Challenge:

Focus on the community/get their attention.
Listen.
See the BIG PICTURE.
Get beyond the library.

Responsibilities

- Develop a marketing plan and budget.
- Identify goals, objectives, benchmarks, new services, communication strategies.
- Plan and develop ongoing research, including schedule.
- Develop and keep materials up-to-date, consistent in look.
- Monitor trends in libraries, community and nation.
- Keep in regular contact with key markets (via attendance at key groups, etc.).
- Sponsor in-house training on marketing related topics/library goals.
- Develop expertise via training, reading and doing excellent work in marketing and communication.
- Spread the word. Be pro-active.